

# Global Photoresists Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Photoresists market size is expected to reach \$ 11090 million by 2032, rising at a market growth of 5.8% CAGR during the forecast period (2026-2032).

Photoresist (PR) is a polymeric compound that changes properties when exposed to certain wavelengths of light to form specific patterns on substrate surfaces. PR is a key material for photolithography in the TFT-LCD manufacturing process.

In 2024, the global semiconductor photoresist market (including EUV photoresist, ArF photoresist, KrF photoresist, and i/g-line photoresist) stood at USD 2.99 billion, and is projected to reach USD 5.09 billion by 2032, registering a CAGR of 6.54% from 2026 to 2032.

The global display panel photoresist market (including color photoresist, black photoresist, touch panel photoresist, and TFT-LCD photoresist) was valued at USD 1.81 billion in 2024, and it is anticipated to reach USD 2.43 billion by 2032, with a CAGR of 3.67% for the period 2026-2032.

In 2024, the global PCB photoresist market (including dry film photoresist, solder mask ink, and liquid photoresist) reached USD 1.89 billion, and it is forecasted to grow to USD 3.29 billion by 2032, at a CAGR of 7.1% from 2026 to 2032.

In terms of semiconductor photoresist, the core manufacturers are currently producers from Japan, the United States, and South Korea, including Tokyo Ohka Kogyo (TOK), JSR, Shin-Etsu Chemical, Qnity, Fujifilm, Sumitomo Chemical, and Dongjin Semichem of South Korea. In 2024, the top six semiconductor photoresist producers accounted for approximately 84.6% of the global market share. In the domestic Chinese market, the major manufacturers include Reform Technology (with its subsidiary Beijing Kehua Microelectronics), Jiangsu Jingrui Electronic Materials, Xuzhou Bokang Information Chemicals Co., Ltd., Hengkun New Materials, Jiangsu Aisen Semiconductor Materials Co., Ltd., Zhuhai Jishi, Shanghai Sinyang Semiconductor Materials Co., Ltd., Rongda Photosensitive Materials, Beijing Xinyihua Technology Co., Ltd., Guoke Tianji, Jiangsu

Nata Opto-electronic Material Co., Ltd., and Feikai Materials.

For display panel photoresist, the leading manufacturers include Fujifilm, Sumitomo Chemical, Dongjin Semichem, Merck KGaA (AZ), JSR, Nippon Steel Chemical, Yake Technology, DNP Fine Chemicals, Reform Technology (with its subsidiary Beijing Beixu Electronics), and Beijing Xinyihua Technology Co., Ltd. In 2024, the top seven global manufacturers held about 71.8% of the market share.

Regarding PCB photoresist, the core manufacturers of PCB dry film photoresist include Asahi Kasei, Eternal Materials, Resonac, Chang Chun Group, Kolon Industries, Mitsubishi Paper Mills Limited, Qnity, Hunan Chuyuan New Materials Co., Ltd., and Hangzhou First Applied Material Co., Ltd. In 2024, the top six global manufacturers accounted for approximately 67% of the market share. For PCB solder mask ink, the key manufacturers mainly include Taiyo Ink, Rongda Photosensitive Materials, Guangxin Materials, and Resonac, with the top three manufacturers holding 72% of the market share in 2024.

From the consumption perspective, China is currently the world's largest photoresist consumer market, accounting for 34.7% of the global market share in 2024, followed by China's Taiwan region and South Korea, with shares of 20.67% and 19.36% respectively.

On the production side, Japan, North America, China's Taiwan region, South Korea, and mainland China are the major photoresist production regions. In 2024, they accounted for 53.93%, 8.54%, 11.50%, 9.36%, and 9.01% of the global market share respectively. It is expected that in the next few years, the Chinese market will maintain the fastest growth rate, with its share projected to reach 12.43% by 2032.

In terms of product types, semiconductor photoresist is the largest sub-category, accounting for 44.64% of the total photoresist market share in 2024, and this proportion is expected to rise to 47.26% by 2031. The semiconductor photoresist is expected to achieve a CAGR of approximately 6.54% during 2026-2032.

From the perspective of the global supply and demand structure of semiconductor photoresist (including supporting lithography materials such as developers and cleaning agents), the industry is characterized by 'moderate overall volume recovery and structural shift towards advanced processes' in 2024-2025. The global semiconductor photoresist market reached USD 2.991 billion in 2024 and is projected to hit USD 4.883 billion by 2031, with a CAGR of 6.54% from 2025 to 2031. Among them, EUV photoresist is the fastest-growing sub-category, while the demand for mature photoresists such as KrF and ArF is driven more by the increase in the number of layers of 3D NAND and the recovery of capacity utilization in memory and some mature logic processes. On the supply side, photoresist is a typical material featuring 'strong certification requirements and tight process coupling'. The formula (resins, solvents, photoacid generators (PAGs), quenchers, etc.), coating thickness uniformity, defect

density, metal ion control, and coordination with exposure/development windows all require long-term joint development and verification with wafer fabs, resulting in a naturally high degree of industry concentration. Manufacturers from Japan, South Korea, and the United States have long occupied a key position in high-end photoresist (especially EUV photoresist). In 2024, Japanese manufacturers accounted for 75% of the global market share, followed by U.S. manufacturers with 12.25%, South Korean manufacturers with 4.99%, and European manufacturers with 4.21%. Domestic Chinese manufacturers only held a 2.68% share of the global market in 2024. Leading global enterprises are also continuously expanding production capacity and global delivery systems to serve customers in North America, Europe, and Asia.

Looking ahead to the next 2-5 years, the core growth drivers of semiconductor photoresist will revolve around the process evolution of advanced logic/advanced memory, the material iteration of EUV/High-NA, and the demand expansion of 'thick-film/multi-layer lithography' brought by advanced packaging. On one hand, AI/HPC is driving the expansion of advanced logic (3nm - 2nm-class) production capacity, and the penetration rate of EUV in key layers will continue to increase. High-NA EUV is widely regarded by the industry to enter a more substantial mass production introduction window around 2026, which will shift the focus of materials to 'lower stochastic defects, higher resolution/lower line edge roughness (LER), improved sensitivity at acceptable doses, and adaptation to new photomasks/exposure conditions'. This will promote the further evolution of EUV photoresist from the traditional chemically amplified photoresist system to new systems such as metal oxide resist (MOR) and the coordination with supporting processes (e.g., JSR's acquisition of Inpria to strengthen its layout of EUV metal oxide photoresist). On the other hand, in the process of DRAM miniaturization and continuous stacking of 3D NAND, DUV photoresist will maintain a 'large and stable' market base, and benefit from the demand for multi-patterning and yield repair in specific process steps. Meanwhile, advanced packaging (RDL, Fan-Out, WLP, etc.) is increasing the usage intensity of thick-film photoresist/dry film/dry lithography, and new routes such as 'dry resist' are being introduced to reduce the defects and cost pressure caused by multiple wet coating processes. Representative equipment and process ecosystems are also advancing verification and mass production. Key external variables to focus on include: geopolitics and supply security (long certification cycles lead to weak short-term substitution elasticity, and the construction of regional/localized production capacity and formula systems will continue to accelerate), as well as environmental and compliance constraints (multiple studies have emphasized the irreplaceability of PFAS (Per- and Polyfluoroalkyl Substances) and other fluorine-containing chemicals in key semiconductor materials. If regulations in regions such as the EU become stricter, it will force material manufacturers to carry out formula restructuring, supply chain

compliance, and alternative path research and development, but it may also lead to cost and delivery cycle fluctuations in the short term).

This report studies the global Photoresists production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Photoresists and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Photoresists that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Photoresists total production and demand, 2021-2032, (Tons)

Global Photoresists total production value, 2021-2032, (USD Million)

Global Photoresists production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Photoresists consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Photoresists domestic production, consumption, key domestic manufacturers and share

Global Photoresists production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Photoresists production by Imaging Mechanism, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Photoresists production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Photoresists market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include TOKYO OHKA KOGYO CO., LTD. (TOK), JSR, Shin-Etsu Chemical, Qnity, Fujifilm, Sumitomo Chemical, Dongjin Semichem, Merck KGaA (AZ), Allresist GmbH, Futurrex, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Photoresists market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Kg) by manufacturer, by Imaging Mechanism, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

### Global Photoresists Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global Photoresists Market, Segmentation by Imaging Mechanism:

Positive Photoresists

Negative Photoresists

### Global Photoresists Market, Segmentation by Type:

EUV Photoresist

ArFi Photoresist

ArF Dry Photoresist

KrF Photoresist

g/i-Line

Others

### Global Photoresists Market, Segmentation by Process Node:

High End / Advanced 110nm

DRAM and NAND

### Global Photoresists Market, Segmentation by Application:

Semiconductor Photoresists

LCD Photoresists

PCB Photoresists

### **Companies Profiled:**

TOKYO OHKA KOGYO CO., LTD. (TOK)

JSR

Shin-Etsu Chemical

Qnity

Fujifilm

Sumitomo Chemical

Dongjin Semichem

Merck KGaA (AZ)

Allresist GmbH

Futurrex

KemLab? Inc

YCCHEM Co., Ltd

SK Materials Performance (SKMP)

Everlight Chemical

Red Avenue

Crystal Clear Electronic Material

Xuzhou B & C Chemical

Xiamen Hengkun New Material Technology

Jiangsu Aisen Semiconductor Material

Zhuhai Cornerstone Technologies

Shanghai Sinyang Semiconductor Materials

ShenZhen RongDa Photosensitive Science & Technology

SINEVA

Guoke Tianji

Jiangsu Nata Opto-electronic Material

PhiChem

NIPPON STEEL Chemical & Material

Jiangsu Yoke Technology

DNP Fine Chemicals

Chimei

Daxin Materials

Jiangsu Kuangshun

Eternal Material Technology

Samsung SDI

Taiyo Ink MFG

Asahi Kasei

Eternal Materials

Resonac

Chang Chun Group

Kolon Industries

Mitsubishi Paper Mills Limited

SAN-EI KAGAKU

Huntsman

Onstatic Technology

Hunan Initial New Materials

Hangzhou First Applied Material

Hubei Dinglong Holding

Lam Research

Tianjin Jiuri New Material

Zeon Corporation

**Key Questions Answered:**

1. How big is the global Photoresists market?
2. What is the demand of the global Photoresists market?
3. What is the year over year growth of the global Photoresists market?
4. What is the production and production value of the global Photoresists market?
5. Who are the key producers in the global Photoresists market?
6. What are the growth factors driving the market demand?

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